CSC

50 YEARS STRONG

MadCap Flare Online Help Creation and Publishing Process Approach

January 12, 2011

North Carolina Department of Health and Human Services

OFFICE OF MMIS SERVICES

Agenda

- Review of the help system
  - Lots of new staff some new things to share- Tom Hoth
  - Demo of Help System in MPAS – Dan Austin
- Help creation process
  - Process Overview – Jennifer Snell
  - Online Help Scope and Screen Example – Jennifer Snell
  - Authoring Help – Jennifer Snell
  - Version Control – Dan Austin
- Review – Jennifer Snell
- Questions and Answers – Jennifer Snell

Introduction

- **Online Help Team Members**
- Tom Hoth, UI Architect and Team Manager/Lead for Web Development
- Jennifer Snell, Senior Business Analyst, Web Development
- Dan Austin, Help System Developer

Help Requirements from RFP

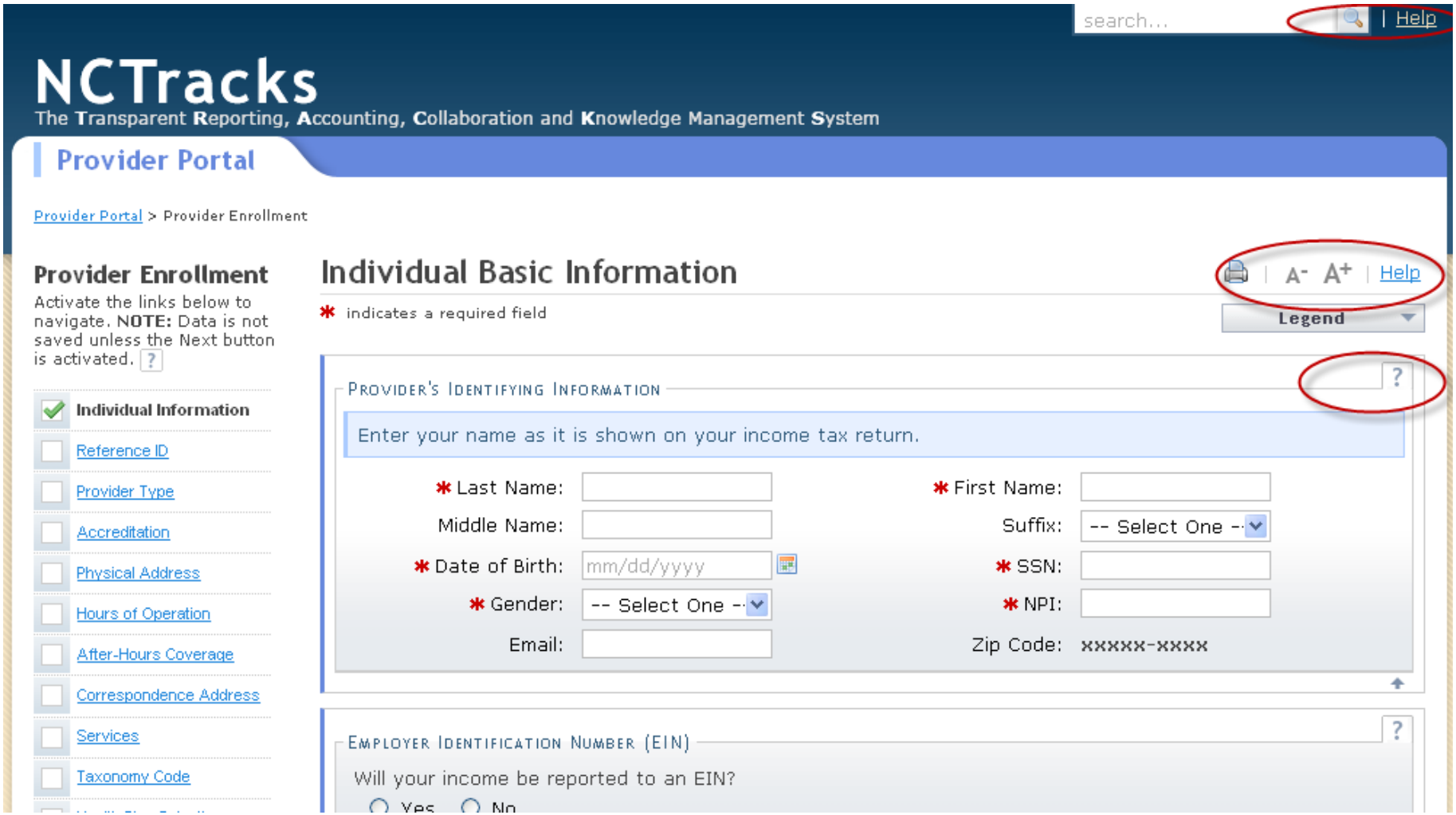
- 40.1.1.57 - Provides capability for selectable online help views for user functionality that duplicate or link to system documentation.
- 40.1.1.58 - Provides capability for online help for all features, functions, and data element fields as well as descriptions and resolutions for error messages, using help features, including indexing, searching, tool tips, mouse-over, field value options, hypertext links to files, reports, and context-sensitive help topics.
- 40.1.1.59 - Provides capability for context-sensitive help to view, window, or dialog.

Online Help Scope

- Online Help will be created for the following:
  - General Public Portal
  - Operations Portal
  - Provider Portal
  - Recipient Portal

- Four Levels of Help:
  - System Help, by Portal (Includes Navigation Help, Button Help etc.)
  - Page Help
  - Data Form Group Help (Including Field Specific Help)
  - Tool Tip (Note: not managed in the Flare System)

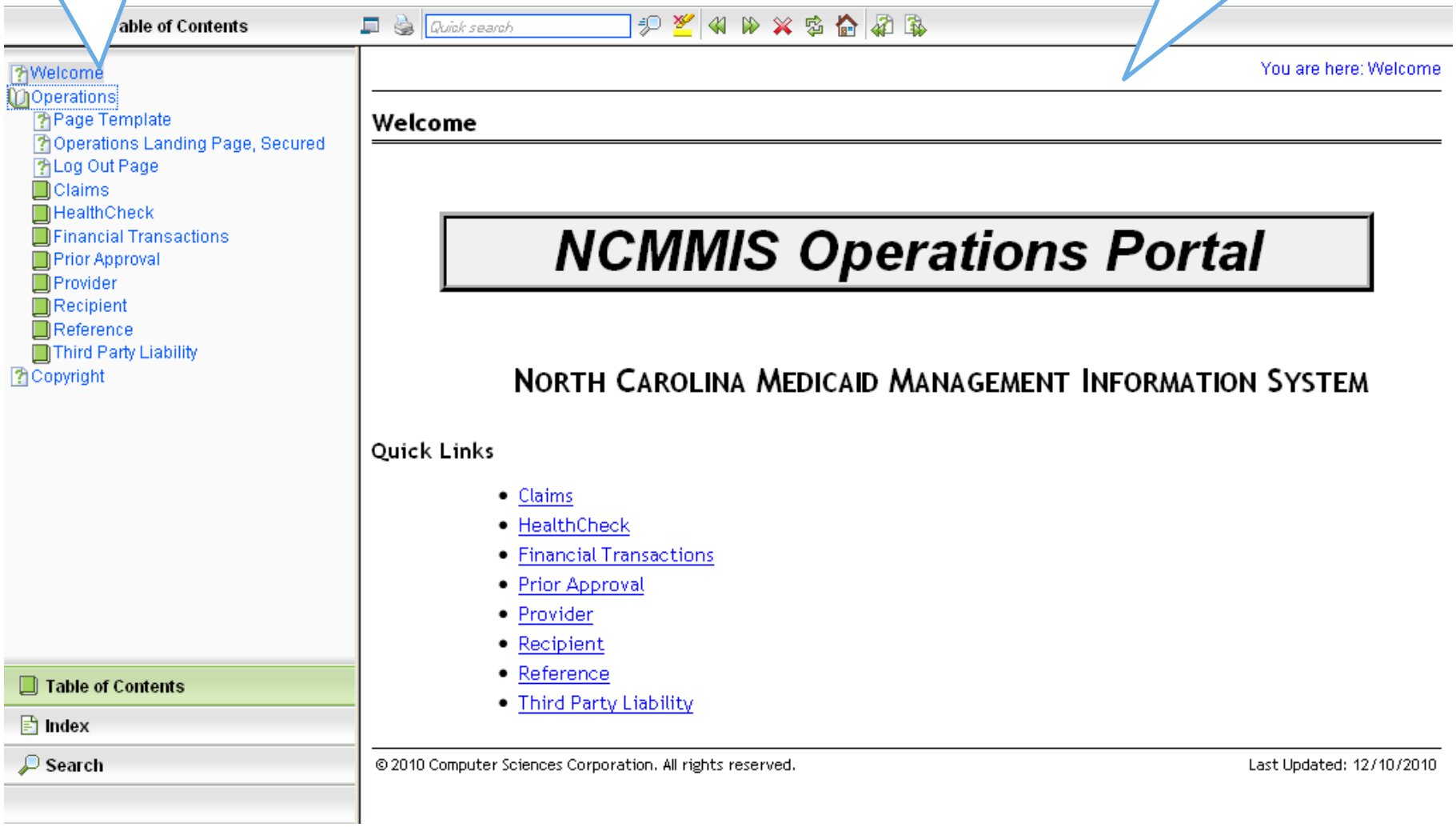
Online Help Screen Example



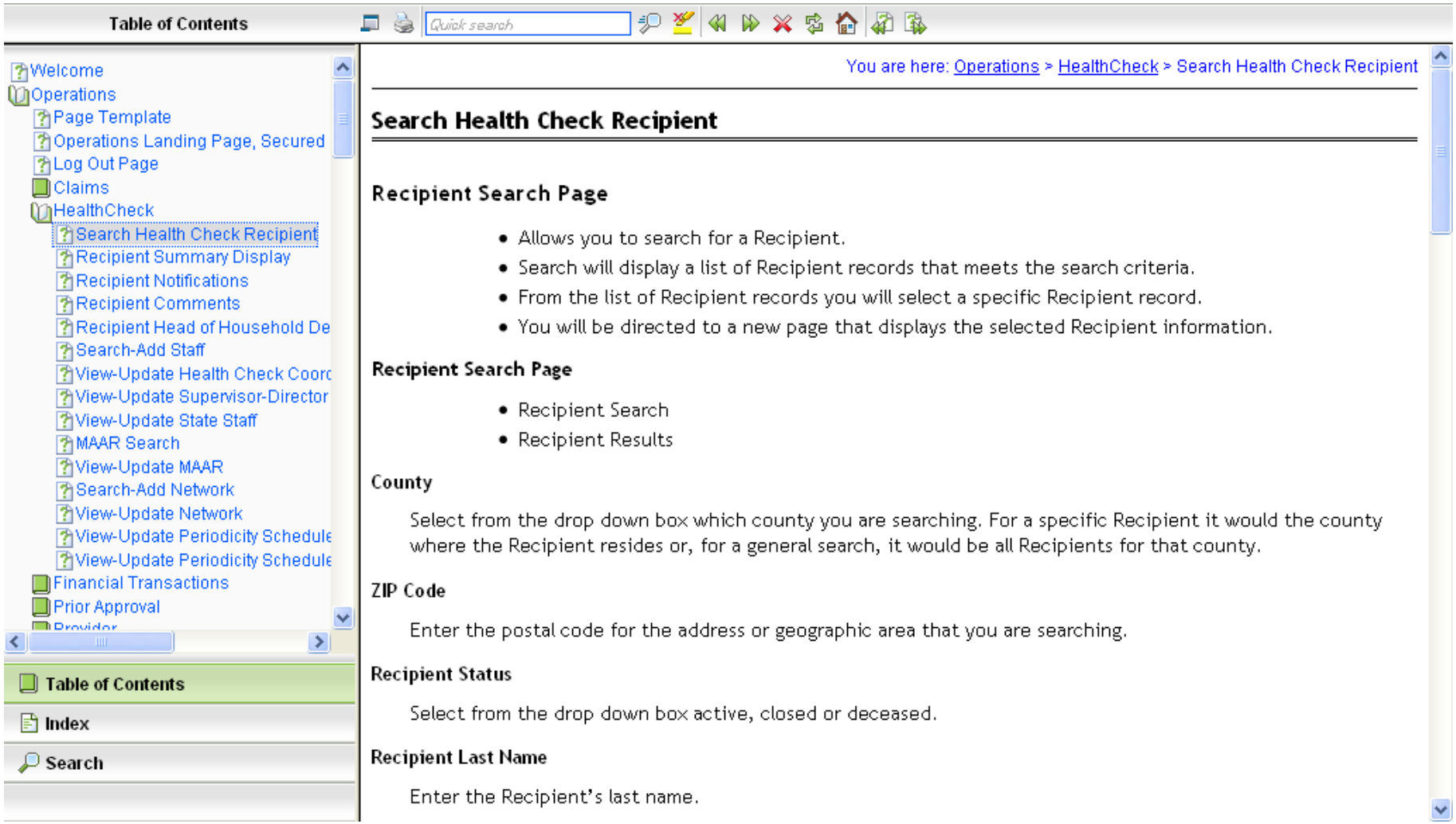
Screen Example

Navigation Pane

Content Pane



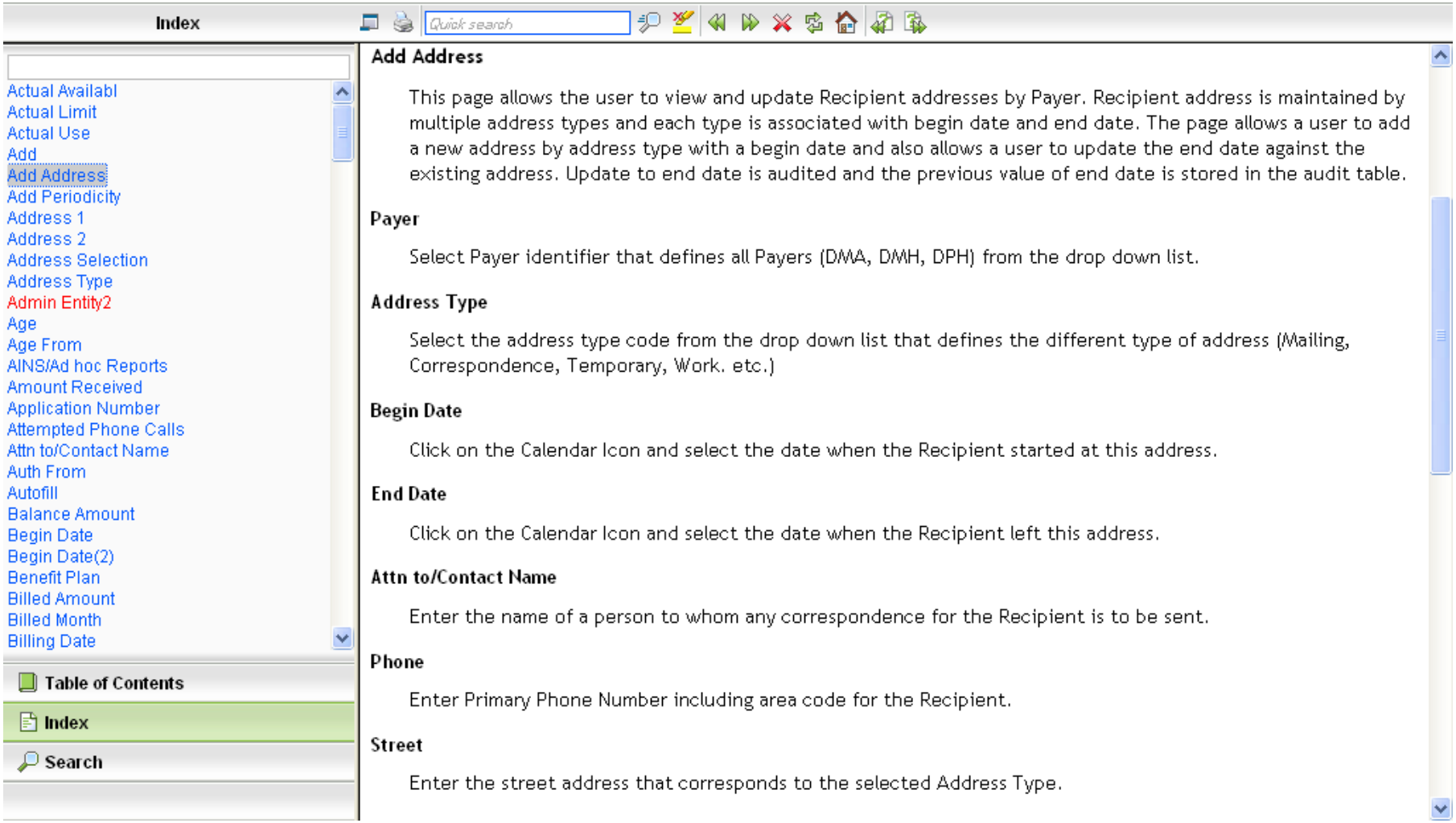
Navigate by Table of Contents



Navigate by Table of Contents

- Table of Contents is the outline structure of the Help System
- Click on closed books to open them and reveal contents
- Click on topics to show the contents in the Content Pane on the right

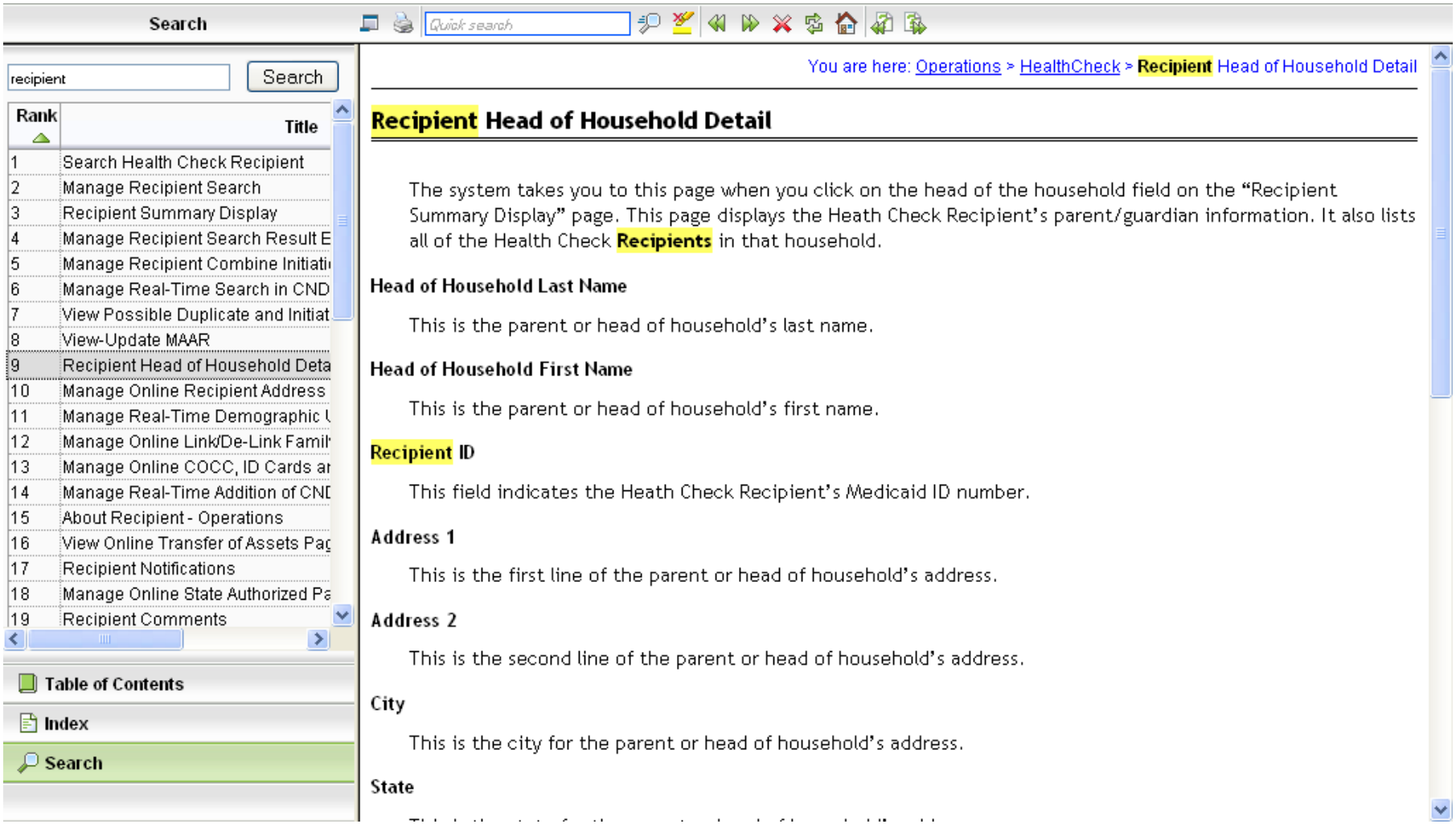
Navigate by Index



Navigate by Index

- Click on Index “Accordion Button” at bottom of Navigation Pane
- Find the term you want in the list and click it to jump to the topic where the indexed term is located
- If the term is found in more than one topic, a list of topics will be shown
- Click on the topic in the list to jump to it

Navigate by Search



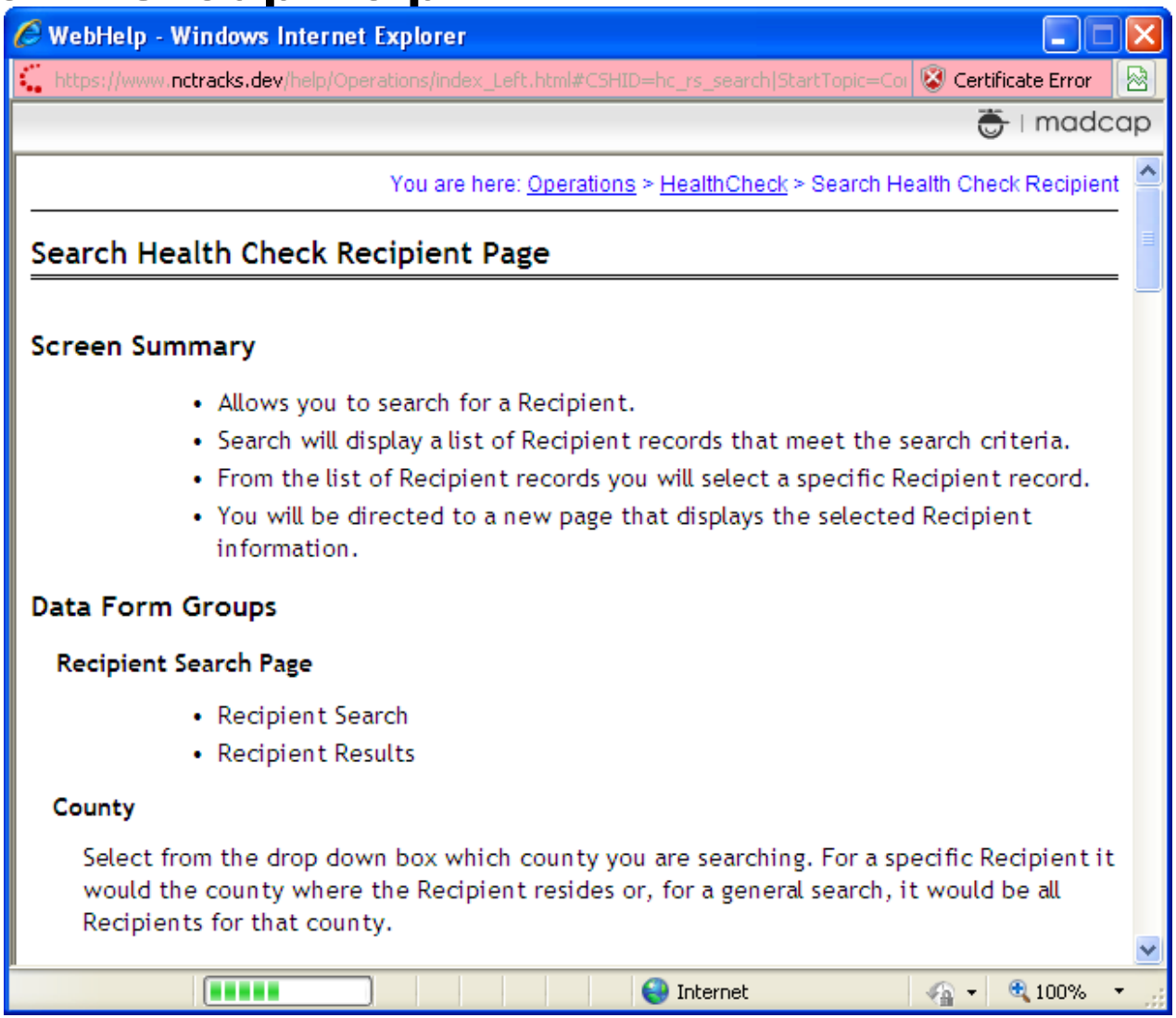
Navigate by Search

- Click on Search “Accordion Button” at bottom of Navigation Pane
- Type a word for phrase in the Search Box and click the Search Button
- A list of relevant topics is displayed
- Click on a topic in the list to jump to it

Data Form Group Help

- Click on a Question Mark for help on that section
- The Help System jumps directly to the help for that section

Data Form Group Help



Data Element Definitions

- Each topic contains a list of Data Elements for that Screen
- Clicking on a Data Element Name opens a pop-up window containing the definitions for that Data Element

System Help

Using Online Help

Using the Table of Contents

The Table of Contents provides the overall outline and organization of the help system and the relationship between topics. It contains books and pages that represent the categories of information in the online help system.

To find topics using the Table of Contents:

1. Click the large **Table of Contents** button

in the left navigation pane. When you first open a help system, the table of contents appears in the left pane.
2. When you click:
   - a closed book, it opens to display its contents
   - an open book, it closes
   - a page, the topic appears in the right-hand pane

Using the Index

The Index pane displays a multi-level of keywords and keyword phrases that enable you to find associated topics.

To find topics using the index:

1. Click the large **Index** button

in the left navigation pane.
2. Select a Keyword.
   - Type a keyword or phrase, and press the <**Enter**> key.
   - Use the scroll bar to browse the keyword list.

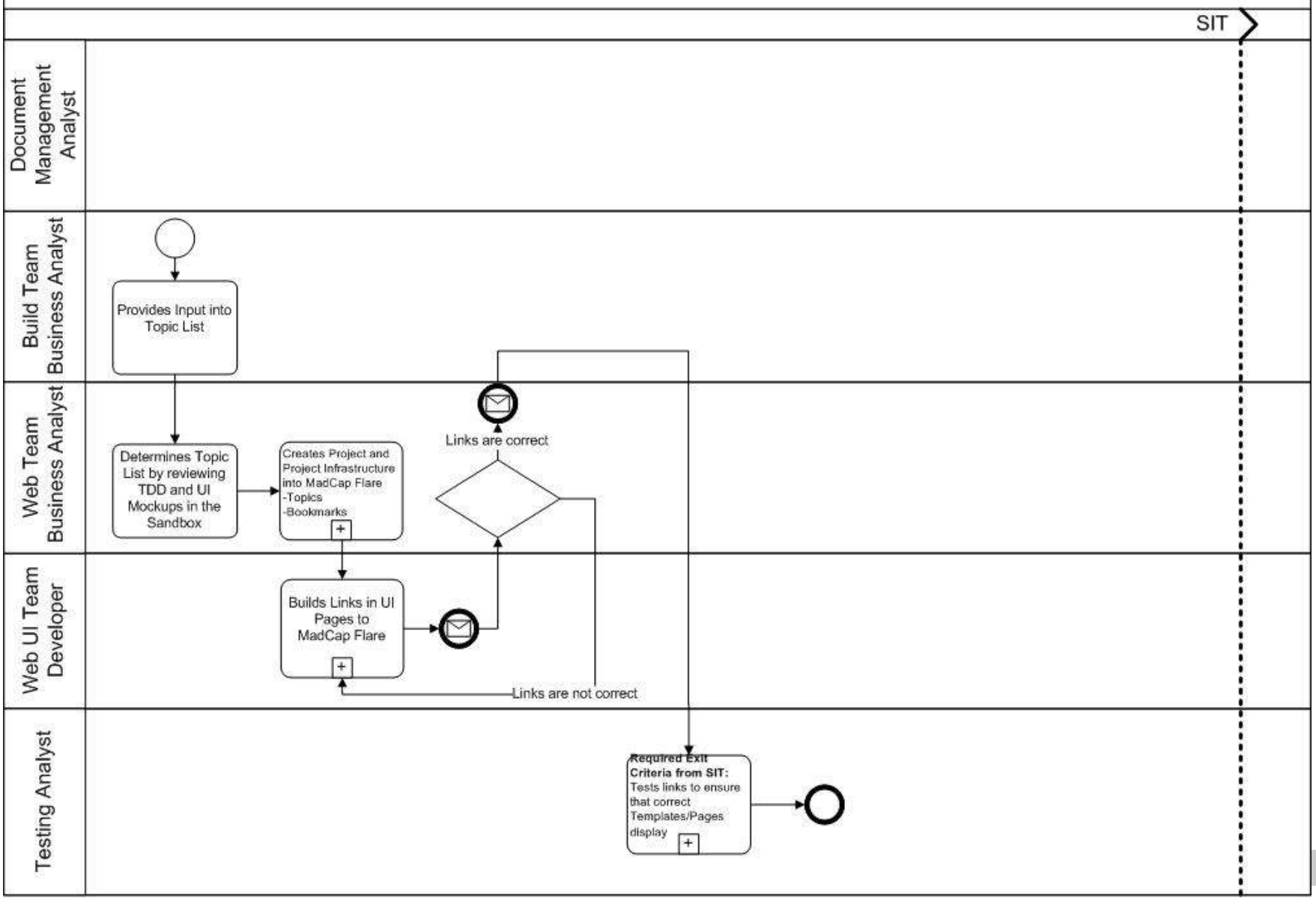
System Help

- “Help on Help”
- Shows the user how to navigate through the help system to easily find the information they need
- Describes the system functions and how they work:
  - ✓ Breadcrumbs
  - ✓ Data Grids
  - ✓ Buttons

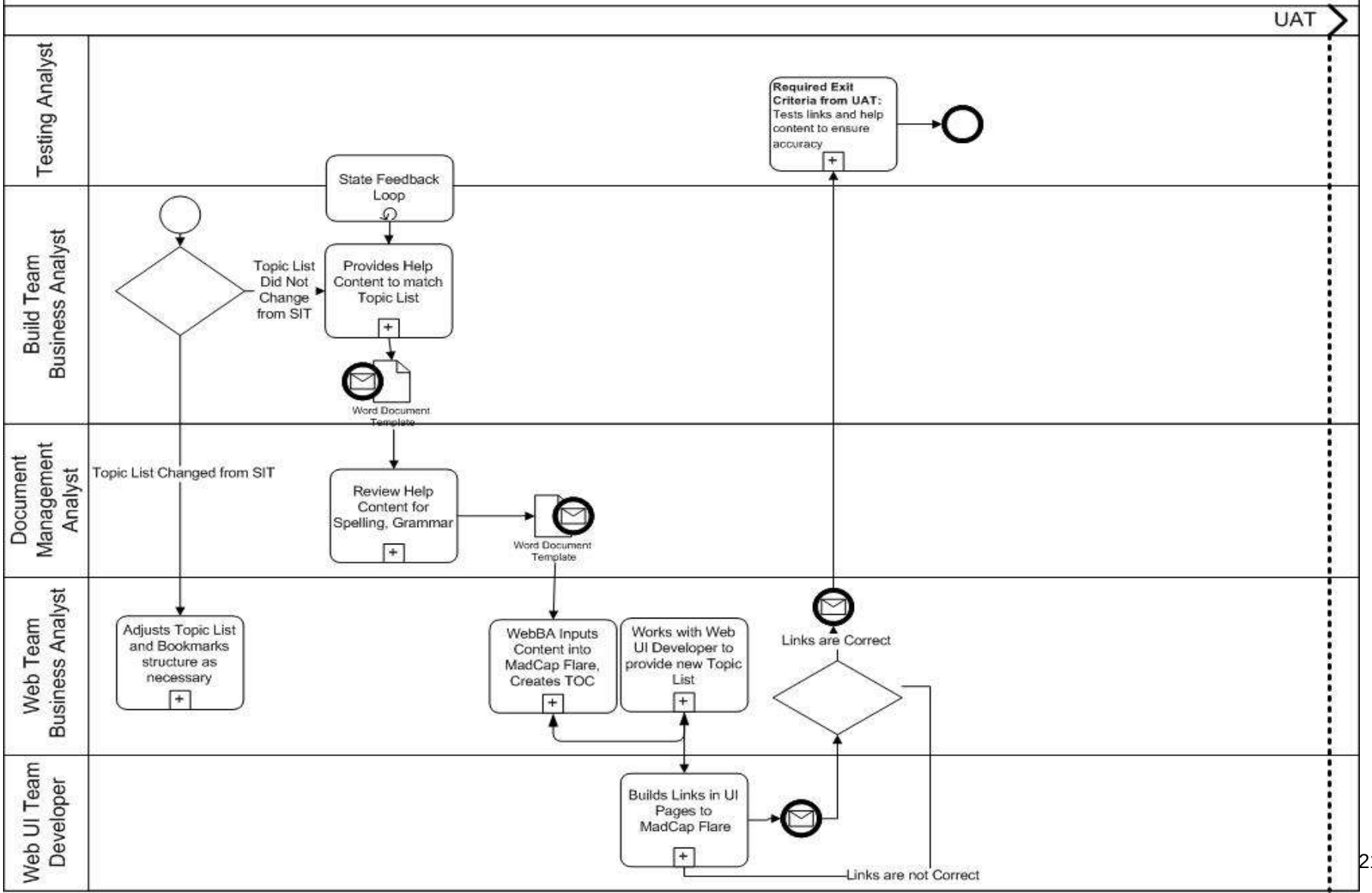
Online Help Creation and Publishing Process Overview

- Systems Integration Test
- User Acceptance Test

Creating Online Help for SIT



Creating Online Help for UAT



Master Help Documentation

- http://sandbox.nctracks.com/help/Master/
- Contains the contents of all portals' help systems
- For internal review purposes only

Help Content Version Control

- All project files will be housed on a server
- Versioned and stored in Subversion

Review

- Four Levels of Help

  (System, Page, Data Form Group, Tooltips)
- Help Demo
- Help Process
  - Web Team will create MSWord output templates for each topic
  - Build Business Analysts will author content
- Average Amount to create one page of help 15-30 minutes, depending on complexity
- Web Team will automatically populate Data Elements for a page

Questions and Answers